

NCSC XXVI Case Profiles 2024



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Round 1 Salesperson Info

Case Info

You have been on the Gartner team for around 12 months. You found White Hat on Forbes.com when researching top tech companies to work for. You did additional research via Sales Navigator.

On LinkedIn Sales Navigator

Revenues: \$100m - \$300m in revenue
Employees: 450 employees
1 yr. growth: 100%
HQ: Atlanta, GA
Founded: 2016

The Sales Call

You called Tony Krystofik's office and gained this appointment through Tony's admin, John Cox. You spoke with John briefly, but he seemed in a hurry, and you did not speak with Tony. John mentioned that Tony was working on several projects. You asked what kinds of projects, and John said he was not sure, but knows Tony had product development meetings associated with AI.

What you Found

Your Research: White Hat is a leading provider of enterprise open-source solutions in North America. White Hat uses a community-powered approach to deliver high-performing Linux, hybrid cloud, edge, and Kubernetes technologies. Similar company:

<https://www.redhat.com/en>

Administrative Team from the website:

President & CEO: J.J. Peltier

Dir. of Product Strategy: Tony Krystofik

Dir. of Marketing Strategy: Emi Goad

Prospect Background

Prospect Background:

From LinkedIn: Tony Krystofik

White Hat: Dir. of Prod Strategy (9mths)

Dell Technologies Dir. Solutions Product Marketing (1yr 3mths)

Oracle: Sr. Dir. Prod. Strategy (2yrs)

Consultant: Prod. Marketing & Management (2yrs)

Stratus Technologies: Sr. Dir. Mktg Dev. & Strategy (5yrs 2mths)

Education: Northeastern Univ. (B.S.)
Computer Science, minor, Bus. Admin.





Wildcard Round Salesperson Info

Case Info

You have been on the Gartner team for around 12 months. You found White Hat on Forbes.com when researching top tech companies to work for. You did additional research via Sales Navigator.

On LinkedIn Sales Navigator

Revenues: \$100m - \$300m in revenue

Employees: 450 employees

1 yr. growth: 100%

HQ: Atlanta, GA

Founded: 2016

The Sales Call

You called Tony Krystofik's office and spoke with Tony's admin, John Cox. You provided your WIFM/Attn. statement, but John said he would have to get back to you. Tony was in a meeting with J.J. Peltier, at the moment. John called you back and said that Tony and J.J. Peltier would like to meet with you. Your research in your CRM indicated that another Gartner salesperson had communicated with White Hat last year, but nothing came from that relationship. The notes indicated that they had an interest in AI at that time. Contact is no longer with White Hat.

What you Found

Your Research: White Hat is a leading provider of enterprise open-source solutions in North America. White Hat uses a community-powered approach to deliver high-performing Linux, hybrid cloud, edge, and Kubernetes technologies. Similar company:

<https://www.redhat.com/en>

Administrative Team from the website:

President & CEO: J.J. Peltier

Dir. of Product Strategy: Tony Krystofik

Dir. of Marketing Strategy: Emi Goad

Prospect Background

Prospect Background:

From LinkedIn: Tony Krystofik – See info from previous case/meeting.

From LinkedIn: J.J. Peltier

White Hat: CEO (4yrs)

Data Fusion: CEO (5yrs 2mths)

White Hat: N. Am. Partner Advisory Council Member (2yrs)

Sure Power Consulting: National Account Manager: (2yrs)

Education: New Hampshire College. (B.S.) Applied Science – Hospitality Administration/Management.





Case Info

You have been on the Gartner sales team for a little over a year and have been cold-calling mid-size technology companies. You recently saw a prospect from your CRM, SmartDox, mentioned in an article in [builtin](https://builtin.com) magazine (builtin.com) about the 80 Top Healthcare Startups and Healthtech Companies. You did some research on LinkedIn and Sales Navigator.

On LinkedIn Sales Navigator

Revenues: \$5.5m - \$60m in revenue
Employees: 29 employees
2 yr. growth: 120%
HQ: St. Louis, MO
Founded: 2019

What you Found

Your Research: Founded in 2019 by a well-versed team hailing from both the public and private sectors. SmartDox will empower crews to find and fix deficiencies with their current documentation practices. A clear description of Medical Necessity is often the most significant EMS documentation issue to cause overpayments. SmartDox Solutions provides better documentation by creating direct, well-written statements for auditors to see why the patient's condition supports transport by ambulance. Similar company:

<https://medcompservices.com/smartdoc/>

Administrative Team from the website:

CEO: Yani Suki
Chief Product Officer: K.K. Peesker
Chief Marketing Officer: J.J. Riggs

Quarter-Final Round Salesperson Info

The Sales Call

You have been trying to connect with Yani Suki, CEO, via phone and email. Yani finally accepted your invitation to connect on LinkedIn last week and suggested you meet with the Chief Marketing Officer, J.J. Riggs. J.J. was impressed that you saw the news article mentioning SmartDox but did not provide any other information. The news article did state that SmartDox was going to enable healthcare collaboration and accelerated development of solutions to improve patient care.

Prospect Background

From LinkedIn: J.J. Riggs

Prospect Background:

From LinkedIn: J.J. Riggs (St. Louis, MO)

A goal-driven leader, who loves building teams and watching them deliver products, tools, and capabilities beyond their own expectations.

Work History:

SmartDox: CMO, Jan 2024 – Present

AlphaOmega: Founder, Nov 2016 – Dec 2023

trinet: Head of Product Security, 2010 - 2016

Education:

Hillsdale College - BA Communications

Columbia Business School - MBA



Case Info

The meeting with SmartDox went very well and you thought this might be a great industry sector to exploit. You found Avalon Health also in [builtin magazine \(builtin.com\)](http://builtin.com)
Similar company: <http://www.avaneerhealth.com>

On LinkedIn Sales Navigator

Revenues: \$10M - \$20M

2 Year Growth: - 4%

Employees: 40

HQ: Oak Brook, IL

Founded: 2019

The Sales Call

You had a short 10-minute meeting with Duleep Delpechitre, the CPO. Duleep was called out for a business emergency before finishing the call. You did gain some information. The overall goals of the organization include improving revenues by 100% over the next 2 years and lowering costs by around 5%. Duleep also mentioned Avalon had several initiatives planned to turn around the revenue decline. When you called back, Duleep's admin indicated Andi Loring, the CEO would be in this meeting also.

What you Found

Avalon Health is a first-of-its-kind private, secure, trusted network created exclusively by healthcare leaders to enable seamless communication and collaboration between payers, providers, and other healthcare administration companies.

Specialties: HIT, Interoperability, Blockchain, Payers, Hospitals and Health Systems, Networks, Data platform.

Administrative Team from the website:

CEO: Andi Loring

VP Marketing: Ray Pirouz

Chief Product Officer: Duleep Delpechitre

Prospect Background

From LinkedIn: Andi Loring

Prospect Background: Andi is a lifelong strategist and innovator in healthcare and fintech. From the very beginning of Andi's career, Andi identified unique ways to leverage technology to improve processes and transform consumer experiences. As CEO of Avalon Health, Andi leads the team in building an inclusive network that solves the problem of interoperability by ensuring all stakeholders have equal and easy access to patient data when it's needed most.

Avalon Health: CEO, Aug. 2021 – Present (2 yrs 6 mos)

JPMorgan Chase: Managing Dir. Head of Healthcare Payments, 2018 – 2021 (2 yrs 11 mos)

Citi: Dir. Healthcare Payment Solutions, 2012 – 2015 (2 yrs 9 mos)

Education: Univ. Illinois, Urbana-Champaign

Duleep Delpechitre is not on LinkedIn.